



ORGANIZATIONAL VISION CASTING

WORKSHEET



TRUE
NORTH
BUSINESS

ORGANIZATIONAL VISION CASTING WORKSHEET

Managing a business can be more like following a winding road rather than a straight path. Despite our best efforts to head straight to our destination (our vision), we still tended to “zig and zag” back and forth as we move forward.

Both leading *and* managing are important to your journey to effective leadership, but there is a proper order. It is your responsibility to first lead your people (enhance relationships) before you manage the things of your business (pursued results).



Every person can minimize triangulation in life and in business by
doing two things and doing them in order.

THE BUSINESS TWO-STEP

1. Lead first.

You are responsible for leading yourself personally first with a vision, and as the leader of your business, for leading your people first with a vision (a destination, a direction, a dream) as to where you are going.



2. Manage second.

You are responsible for pausing, reflecting, thinking, and evaluating/managing your progress toward your vision for yourself personally and for your business.

I have observed that when we jump first to solve a problem before we have a vision (a direction), we immediately place a ceiling on our personal and business growth.

Lead first and create your vision. Manage second, and then, help your people get there.



FOUR IMPORTANT LEADERSHIP QUALITIES

All leaders can successfully achieve their vision by living out the following four leadership qualities.

1. Trust

Remember, trust is the foundation of leadership. If your people trust you, they'll forgive occasional mistakes, but if you break their trust, you forfeit your ability to lead. Remember, you can earn your people's respect by displaying these qualities:

- Integrity
- Humility
- Authenticity
- Selflessness

Also, leaders must first believe in their people before their people will believe in them.

2. Connection

Connection occurs when you win people over before you enlist their help. You, as the leader, have the responsibility to initiate connection with your people.

Never underestimate the power of building relationships with your people before asking them to follow you.

When the leader has done well connecting with his people, such as through the process of MBWA (Management by Walking Around), you can expect to see employees exhibiting loyalty and a strong work ethic. And the leader's vision becomes an inspiration for the people.

3. Empowerment

When you, as the leader, use group exercises to brainstorm ideas and thoughts and when you sincerely seek your people's input, your people have a better understanding of and commitment to the decision that you collaboratively make.

Furthermore, when employees are involved in the creation and implementation planning stages, they take pride in the achievement of the decisions that help reach the vision, the dream.

4. Navigation

Good leaders do more than control the direction in which they and their people travel. They also

- See the whole trip in their mind before moving forward.
- Have a vision for getting to their destination.
- Understand what it will take to get there.
- Know who they'll need on the team to be successful.
- Recognize the obstacles long before they appear.
- Leaders who effectively navigate have the ability to balance between
- Optimism and realism
- Intuition and planning
- Faith and fact

And they have a professional will to find a way for the team to succeed because they believe that anything less than success is unacceptable.

It is *not* the size of the vision or project that determines success. It is the size of the leader.

PREPARING TO WRITE YOUR ORGANIZATIONAL VISION STATEMENT



As leaders, we need to take certain steps to prepare for this important process of discovering our organizational vision.

EVERY LEADER CAN PREPARE TO WRITE A VISION STATEMENT BY TAKING THREE STEPS.

1. Ask

Before you can know where you are going, you must first ask yourself two questions:

- Where have you been?
- Where are you now?

2. Connect: MBWA

After you've answered those two key questions, the next step in preparing to write your vision is to connect with your people. One of the best ways to connect with your people is to regularly do MBWA.

If you ask questions and listen, the responses will be amazing. People will become energized simply because you asked.

3. Analyze: SWOT

The final step is to do a SWOT analysis, which stands for strengths, weaknesses, opportunities, and threats. A SWOT analysis is a structured planning method used to find your competitive advantage by evaluating the internal factors and external factors affecting the organization.

To assess your organization's internal factors, write down the following:

- **Strengths.** These are the characteristics of the business or project that give it an advantage over others.
- **Weaknesses.** These are the characteristics that place the business or project at a disadvantage relative to others.

To assess your organization's external factors, write down the following:

- **Opportunities.** These are the elements that the project could exploit to its advantage.
- **Threats.** These are the elements in the environment that could cause trouble for the business or project.

External factors may include macroeconomic matters, technological changes, legislation, and sociocultural changes, as well as changes in the marketplace (customers and suppliers) or in competitive position.

DETERMINE YOUR ORGANIZATION'S VISION



All leaders can determine their organization's vision by following three simple steps.

- Has a wow factor, where you would feel fantastic if you could make it happen
- Is something you really want to be a part of and are willing to put significant effort into realizing
- Energizes and excites you
- Will require a quantum step forward in your capabilities and characteristics
- Is something you are 100 percent committed to

1. Thoroughly understand the criteria.

Before you begin writing your vision statement, it's important to know exactly what it is.

Let's first start with what a vision statement is *not*. It is not

- About money. Money only gets temporary movement; it is not enough to actually motivate you. You will work harder for meaning than for money.
- Verbose
- Hard to understand and convoluted
- Impossible to remember

Instead, a vision statement

- Preserves your core values and purpose (which never change) and stimulates progress (which is always changing)
- Is vibrant and engaging
- Produces a visual image or picture
- Is a huge, daunting, exhilarating challenge
- Is clear and compelling
- Is something people "get" right away
- Serves as a focal point
- Galvanizes people
- Catalyzes and creates
- Inspires passion, intensity, emotion, and conviction for living it out

2. Vividly describe your vision.

Use words to clearly describe your vision so that you and your employees can explain it to all stakeholders (e.g., employees, customers, suppliers, investors). Your envisioned future should be so vivid to you that it's as if you've already taken the journey and you're coming back to take your people up to the mountain top so they can experience the same victory.

Here's one way you can capture your vision in sufficient detail. Vividly describe your accomplishments as though you have been asked to write an article fifteen years from now for an international publication about an award you have received for accomplishing your organization's vision. Here are some questions to consider:

- What has been your unique impact on the marketplace?
- What are your customers experiencing? Why are they saying "wow!" to describe your service?
- What have these achievements meant to your employees? How do they feel?
- What competencies and systems have you developed?
- What are your suppliers saying about your accomplishments? And why?



3. Collaboratively record your vision.

After you have reviewed the criteria and written a vivid description of your ideal future as an empowering leader, you should involve and seek input from your employees. It is important to ask for this input at the very beginning of the casting-a-vision-statement process and before stating the final version of the vision statement. A good way to determine whom to include in this process is to ask yourself these three key questions:

1. Who can help me write a better vision statement?
2. Who will have to carry it out?
3. Who will be impacted by it?

Then involve those people by using group exercises to brainstorm two, three, or five snippets from the vivid description. When you sincerely seek your people's input, your people have a better understanding of and commitment to the vision you collaboratively set.

Furthermore, when employees are involved in the development/creation of a clear, concise vision statement, they take pride in the achievement of the vision. What is your destiny? Is now the time to clearly define your vision and ask your people to help?